



**STATE OF WISCONSIN**  
**Department of Employee Trust Funds**  
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SECRETARY

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**CORRESPONDENCE MEMORANDUM**

**DATE:** August 25, 2010  
**TO:** Employee Trust Funds Board  
**FROM:** Shawn Smith, Director, Member and Employer Services Bureau  
Roger Fletcher, Director, Program and Benefit Information Bureau  
Division of Retirement Services  
**SUBJECT:** Update on the Service Delivery Changes for Member and Employer  
Education and Outreach

**This memo is for informational purposes only. No Board action is required.**

**Background**

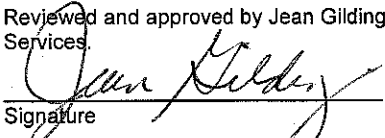
At the June meeting, we provided the Board with the four primary strategies to expand member and employer education and outreach. Those strategies included:

1. Dividing the state into nine service delivery "districts" for member education and outreach purposes.
2. Closing the stand-alone Waukesha office in order to make staff resources available to use towards the broader outreach strategy.
3. Expanding education and outreach to members and employers by making more resource materials available online in multiple formats.
4. Conducting a comprehensive training needs assessment and educational outreach plan for Wisconsin Retirement System (WRS) employers.

The purpose of this memo is to inform you of the progress made since June on the implementation of these strategies.

**1. Dividing the state into nine service delivery "districts" for member education and outreach purposes.**

- An education and outreach staff person has been assigned to each district.
- Pilot group sessions have been planned in each district beginning in January 2011.
- Efforts have begun to compile critical data and contacts for each district (employers and physical locations).

Reviewed and approved by Jean Gilding, Division of Retirement Services.  
  
Signature \_\_\_\_\_ Date 8-30-10

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- Research has been conducted to determine which members in each district have submitted requests for retirement estimates for the purposes of developing marketing materials.
- A workgroup has commenced to ensure our field presentation materials will be consistently delivered.
- Requests have been made for the necessary equipment, such as laptop computers, to enable staff to make the best use of their time in the field.
- Discussions have begun to create an interactive education and outreach section on the Employee Trust Funds (ETF) website that will eventually allow members to schedule appointments online.

**2. Closing the stand-alone Waukesha office in order to make staff resources available to use towards the broader outreach strategy.**

- Developing and implementing a detailed communications plan with the assistance of the Office of Communications and Legislation. Several elements include:
  - A comprehensive article to appear in the September *Trust Fund News*.
  - Emails sent to over 200 Southeast Wisconsin WRS employers that informed them of the change and asked if they would be willing to host an educational session from ETF staff at their location.
  - Contacts with key stakeholder groups, legislators, and other interested parties.
  - Information about new hours and effective dates in Waukesha.
  - A "What's New" item on the ETF website.
- Planning and coordinating for the physical closure of the office has commenced with ETF facility staff and onsite staff from the Department of Administration. A complete office inventory has been completed.
- Increasing the number of group sessions at the Waukesha location each week during the transition to ensure there is no service gap.

**3. Expanding education and outreach to members and employers by making more resource materials available online in multiple formats.**

- Detailed requests have been made and conversations started with the Department's budget and information technology staff to secure the tools necessary to expand our online presence.

**4. Conducting a comprehensive training needs assessment and educational outreach plan for WRS employers.**

- A survey tool is in development and will be finalized and implemented this fall.
- Began an effort to record employer requests for onsite visits for use in gauging demand for outreach services.

Staff will be available at the September Board meeting to answer any questions you may have.